

# Wen Raiti, CPA

1349 N Market St, Jacksonville, FL 32206, Tel: (412) 983-6012, e-Mail: [peacewen@hotmail.com](mailto:peacewen@hotmail.com)

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## Professional Experience

### House of Leaf & Bean, Inc., Jacksonville, FL

Mar./16 -- Present

#### **Founder & President**

- **Managing the online tea shop**
- **Working as a CFO, overseeing finance, accounting, tax compliance, and payroll.**
- **Working as a HR director, hiring, retaining, training, and scheduling the employees.**
- **Working as a Marketing director, writing posts on social media, updating the online contents, negotiating with the ad agencies, communicating with the media about what we do.**
- **Working as a General Manager, making sure that the kitchen staff is making quality of food, making sure that staff in the Front of the House providing quality of service to our customers. Making sure that we have enough inventory for the daily operations and the catering needs.**

### EverBank, Inc., Jacksonville, FL (a.k.a. TIAA Bank)

Jul./07 – Mar./16

#### **AVP, Corporate Tax Manager**

- Reviewing and filing federal and state income tax returns (including 46 states) prepared by the tax provider;
- Reviewing and filing quarterly estimated tax payments;
- Preparing monthly, quarterly, and annual tax provisions. Preparing and documenting FAS 109 (ASC 740) and FIN 48 calculations; Preparing FIN 48 footnotes and calculations for financial statement audit purpose. Analyzing Officers Compensation for tax impacts quarterly and annually;
- Reconciling tax accounts for US GAAP;
- Documenting rulings and regulations for FIN 48 tax adjustments and tax uncertainties;
- Coordinating and drafting responses to federal and state income tax audits;
- Researching new federal and state tax issues that apply to the company. For example, completed research on Escalation Lease Accrual, Construction Allowance, Mark to Market treatments on loans, securities, and Mortgage Service Rights (MSR & PMSR), Significant Loan Modifications, NOL limitations, and States such as MI, TX, MN, IN, and FL new tax filing rules;
- Completing other tax compliance and tax research requirements by participating in special projects in support of corporate tax goals and objectives.

### Fidelity National Information System, Inc., Jacksonville, FL

Jun./06 – Jun./07

#### **International Tax Manager**

- Supervising daily direct and indirect tax compliances for more than 35 entities in 27 countries and regions;
- Working with US and overseas auditors to comply with financial statutory audits in UK, Singapore; HK, Puerto Rico, Poland, Malaysia, China, Philippines, New Zealand, etc.;
- Reviewing and reconciling Tax accounts for US GAAP and foreign GAAP;
- Setting up Tax Accounting systems for International Tax Compliance;
- Reviewing US International Tax Compliances such as 5471s, 5472s, 8858s, and 1118s;
- Calculating and researching tax savings based on the type of entities, VAT structures, and treaties;
- Reviewing and preparing Tax Provisions, FAS 109 (ASC 740) / FIN 48 for various countries'

statutory audits and US audits.

Ernst & Young LLP, Pittsburgh, PA

Mar./04 – Jun./06

**Senior Staff Accountant**

- Securing and analyzing client data used in the preparation of tax compliance products including federal, state, and international tax returns for corporations, partnerships, and S-corporations in various industries such as consumer products, energy, manufacturing, technology, and communications, etc.;
- Analyzing data and preparing work papers based on professional standards;
- Processing data and converting it to a compliance product, determining the accuracy and completeness of the compliance products;
- Performing quality assurance procedures before the delivery of the compliance products;
- Calculating book-to-tax differences, preparing consolidated federal and state returns for corporate and partnerships;
- Preparing international tax compliance forms such as 5471s, 5472s, 8858s, and 1118s for companies that have international operations;
- Anticipating R&D credit calculations;
- Anticipating FAS 109 (ASC 740) compliances and audit process.

RCHolsinger Associates, P. C. (Certified Public Accountants), Wexford, PA,

Jan./02 – Mar./04

**Staff Accountant**

- Performing various attestation tasks including compilations, reviews, and bookkeeping using QuickBooks;
- Compiling and reviewing monthly and annual financial statements for small business for which the firm maintains the records;
- Securing and analyzing client data used in the preparation of federal and state tax returns for individuals, partnerships, S-corporations, and corporations in various industries;
- Analyzing data and preparing tax returns for trusts, estates, and non-profit organizations, and preparing 1099, W-2, and other payroll related returns.

**EDUCATION**

University of North Florida, Jacksonville, FL

Master of Science in Accounting

GPA: 3.74

Concentration on Taxation

December, 2008

Carlow College, Pittsburgh, PA

GPA: 3.85

Bachelor of Science in: Business Management & Accounting

August, 2002

**COMMUNITY INVOLVEMENTS and LEADERSHIPS**

- Board Member of FAAJA (Florida Asian American Justice Alliance)
- VP of Jacksonville Sister City Association
- Class 2016 of Jacksonville Leadership
- President of Jacksonville Chinese Association
- Chairwoman of Jacksonville Mayor's Asian American Advisory Board
- President of NAAPAC FL(National Asian American PAC FL).
- Founding Member of AFWA (Accounting & Financial Women's Alliance) – Jacksonville
- Member of PICPA (Pennsylvania Institute of Certified Public Accountants)